THE REGIONAL MUNICIPALITY OF OTTAWA-CARLETON
LA MUNICIPALITÉ RÉGIONALE D'OTTAWA-CARLETON

PLANNING COMMITTEE
COMITÉ D'URBANISME

REPORT NUMBER 7 TO THE COUNCIL
RAPPORT N^O 7 PRÉSENTÉ AU CONSEIL RÉGIONAL

The Planning Committee met on 8 March 1983 and submits the recommendations at pages 7, 8 of this Report for the approval of Council at its next regular meeting.

Le Comité d'urbanisme s'est réuni le 8 mars 1983 et présente la(les) recommandation(s) inscrite(s) à la page 7 et 8 du présent rapport à l'approbation du Conseil régional lors de la prochaine réunion ordinaire.

PRESENT
ÉTAIENT PRÉSENTS

Chairman
Président - H. Allen

Members
Membres - D. Bartlett
A. Bouwers
T. Denison
B. Gaffney
B. Grandmaître
G. Hunter
D. Munro

SUBJECT: REGIONAL NON-PROFIT HOUSING STUDY

OBJET: ÉTUDE RÉGIONALE SUR LE LOGEMENT SANS BUT LUCRATIF

REGIONAL NON-PROFIT HOUSING STUDY

The Planning Committee met on 8 March 1983, and considered a staff report of 18 February 1983 on the Regional Non-Profit Housing Study.

The Planning Commissioner's report is:

Quote

INTRODUCTION

Attached is a report containing the findings, conclusions and recommendations from the Region's Non-Profit Housing Study. This study was undertaken in co-operation with the area municipalities and the Ministry of Municipal Affairs and Housing to measure the demand for non-profit housing in the Region and the Region's ability to absorb that demand without disrupting the private market.

The Non-Profit Housing Study is part of the larger Regional Housing Policy Statement Update, which is currently under preparation. This Statement will provide a comprehensive look at housing problems in the Region and suggest specific policy responses and actions for consideration by Regional Council. The Non-Profit Housing Study, now before you, will form an annex to the Regional Housing Statement.

The Regional Non-Profit Housing Study is being brought forward at this time in advance of the Housing Statement for the following reasons:

- area municipalities require the information either to complete and/or amend municipal housing statements which would enable them to develop municipal non-profit housing
- the information is based on a housing survey which was completed last summer, the results of which quickly become dated, and
- the Non-Profit Housing Survey though part of the larger Regional Housing Statement Update is designed to stand alone.

RECOMMENDATION

That Council approve the Non-Profit Housing Study and the recommendations contained therein which are found in the attached 'Executive Summary' at pages 7 and 8.

Unquote

PLANNING COMMITTEE DISCUSSION

The Regional Housing Co-Ordinator, David Kardish, provided the Committee with a presentation on the housing study, directing the Committee's attention to the statistical data resulting from the housing survey, referred to at Annex 'A' and issued separately to Members of Council.

Councillor Gaffney felt that the method used in obtaining information for the report was extremely good, however, she noticed in the report the level of interest for the City of Nepean was higher than that of the City of Vanier. However, the survey allowed for 80 units in Vanier and only 70 in Nepean. There were a number of church groups interested in establishing non-profit housing in Nepean while Vanier did not have the land available for such development.

Councillor Bouwers questioned the value of the survey and felt that at least in the Rural Municipalities, the results were misleading. He felt this was due to the multiplicity of surveys on housing and related matters which rural residents were subjected to, in addition to a general reluctance to provide written information to Governments.

As an example, the survey indicated that Osgoode required only nine units, whereas 85 units had been built, were full and there was a waiting list for more.

Mr. Kardish replied that while demand in rural areas appeared rather conservative, his findings were similar to results from similar surveys conducted by the Ministry of Housing.

Councillor Bartlett had no problem with the overall results of the study but had some doubts about the preciseness of the methodology used, as it applied to rural municipalities. He was concerned that the study did not pick up more than two units of demand for non-profit housing in Rideau, when the Municipality was aware that the demand was closer to 39.

Councillor Munro had no great problems with the study but felt that the underlying problem was the vacancy rate of available housing in the Region. The Councillor felt that more investigation was necessary into the factors contributing to such a low occupancy rate, although he was aware that the state of the economy and rent controls were leading factors. He suggested that perhaps there are too many planning restrictions and it has reached the point where investors can no longer afford to invest in rental housing.

Mr. Kardish replied that a major report addressing the demise of the rental market will be before the Committee in a couple of months.

Councillor Allen requested that this report be supplemented with further information on non-profit housing demand in rural municipalities.

The Committee proceeded to consider the five recommendations in the report, in light of the concerns expressed above.

PLANNING DEPARTMENT RECOMMENDATIONS

Recommendation 1

1. Targets for non-profit production throughout Ottawa-Carleton should be set as follows:

   (a) Approximately 2,400 units for the three year period 1983-1985.

   (b) These targets should include approximately 800 units/year including 600 family units (150 assisted rental and 450 market rent) and 200 senior units (half of which would be market rent and the remaining half should be assisted rent).

   (c) The distribution of the units should be approximately 550 units in the City of Ottawa, 80 units in the City of Vanier, 70 units in the City of Nepean, and 70 units in the City of Gloucester. Though no additional units are specifically justified in the other municipalities, there may be the need for units in certain areas like Cumberland's part of the East Urban Community; which could borrow from Gloucester's demand to justify a project.

   (d) These targets should be interpreted flexibly to allow some transferability of units between area municipalities so long as the 2,400 three year total is not exceeded and that area municipal activities be monitored on the bases of their 3 year activity given the problems of planning and delivering housing within one year.

Recommendation 2

These targets should be referred to the area municipalities with a request that they be reviewed and that the area municipalities determine the programs or mix of programs, i.e. municipal, private or co-operative non-profit that best suits its requirements.

Recommendation 3

That this report be referred to the senior levels of government for review and with the recommendation that the unit allocations necessary to meet the requirements suggested in this report be provided for in their respective 1983, 1984 and 1985 budgetary process and that maximum unit price be modified to reflect the difference in land costs throughout the Region.

Recommendation 4

That the Regional Planning Department continue to closely monitor the rental housing situation in the Region with the intention of modifying the market analysis and targets contained herein, if the market for rental housing warrants such a change.

Recommendation 5

That Regional Council recommend to the Ontario Ministry of Municipal Affairs and Housing that

a) some degree of transferability of units be allowed between municipalities in the Region within similar market areas as long as the overall target of 2,400 units is not exceeded

b) that acquisition of existing rental units be considered in central city areas where there is a shortage of suitable lands for development.

AMENDMENTS

Recommendation 1(a) and 1(b) was amended by replacing the word "approximately" with the words "a minimum of" and "at least" respectively.

Recommendation 1(c) was amended, by changing exact numbers of units with approximate percentages in urban and suburban municipalities and basing the distribution of units for those municipalities not specifically mentioned, on waiting lists or other information of actual demand.

Recommendation 1(d) was amended by deleting reference to "the 2400 three-year total".

Recommendation 5(a) was amended to reflect the following wording:

"The proposed allocation of units among municipalities in the Region, be taken only as a guideline, provided that a minimum target of 2400 units is reached."

Recommendation 5(b) was amended to reflect the following wording:

"that acquisitions of existing rental units be considered in urban areas where the loss of existing rental units to other forms of housing can be demonstrated."

Pursuant to the above, the Committee agreed to certain changes in the wording of the report, to reflect the concerns of the Committee, in line with the amendments to the recommendations.

PLANNING COMMITTEE RECOMMENDATIONS

Incorporating the amendments noted above, the Planning Committee, on the advice of the Planning Commissioner, (with Councillor Bouwers dissenting on recommendation 4) RECOMMENDS that Council approve the recommendations set out on pages 7 and 8, of the attached Executive Summary.

RESPECTFULLY SUBMITTED

H. Allen
Chairman

EXECUTIVE SUMMARY

1. INTRODUCTION

This study was initiated by the Regional Planning Department to assess the requirements for additional non-profit housing in the Region. Need for the study was found both in the perceptions of the current rental shortages in the Region and by the desire of several municipalities to assess the demand for non-profit housing in their municipalities.

Initiated and administered by the Region, the study represents a joint effort of the Region, the area municipalities and the Ontario Ministry of Municipal Affairs and Housing. This study forms part of the Region's municipal housing statement update which is currently being prepared, and will be reproduced as an appendix to the statement.

2. Study Methodology

This study had two main components, a survey and a market analysis.

The survey comprised a random sample of renting households and senior citizen homeowners. The survey included extensive prenotification and follow-up procedures to ensure high quality results. In all, the Region received over a 50% response rate which exceeded our objective of 45%. The surveys were administered by the Region and in all over 5,000 households responded.

Respondents answered questions concerning their interest in non-profit housing and whether they would move into a project, if available. In keeping with the present tenant mix in municipality owned non-profit projects of up to 50% assisted rental housing in senior citizen buildings and up to 25% in family buildings (with a minimum rental assistance component of 15% in both family and senior buildings) respondents were asked which type of unit they would require.

The housing market analysis involved an extensive study of rental housing starts and completions, forecasts of demand and survey of planning offices to indicate potential future development. This was done to assess the extent to which additional non-profit development requirements could be met with no disruption to the private market.

3. Conclusions

From the survey data and from the analysis of the housing market, the following conclusions were drawn:

- A significant portion of the sampled households were interested in renting non-profit housing. Potential users were found to comprise 6.1% of all renters and senior homeowners. (This represents about 7,700 households.)

- The level of interest varied significantly but fairly consistently from municipality to municipality within the Region with the greatest level of per capita interest found in Nepean, Gloucester and Vanier, with 7.8%, 7.3% and 6.9% respectively. This suggests that non-profit housing is generally supportable throughout the urban and suburban parts of the Region.

- The family renters expressed the greatest level of interest with 8.7% of all targeted households interested followed by the senior tenants at 2.7%.

- The survey indicated an overall demand for non-profit units of 7,694 units. Methodological limitations suggest that this is a conservative estimate. 81% or 6,249 households were interested in family units and 19% or 1,445 households were interested in senior units. Over 80% of the demand for non-profit units was for market rents.

- A significant demand and need for rent-geared-to-income housing (according to Ministry of Municipal Affairs and Housing evaluation) was identified for both families and senior citizens. Based on the survey, 836 family and 646 senior citizen rent-geared-to-income units were required in addition to the existing housing stock at the time of the survey.

- Though interest in non-profit housing was widespread throughout the Region, the weighted results of the survey indicate that 71% of non-profit housing is required by Ottawa-based households. Nepean followed with 12.9%, Gloucester with 7.5% and Vanier with 5.5%. The demand for non-profit housing in the remaining municipalities was relatively small.

- The market analysis indicated a continued shortfall in rental housing production relative to demand through 1982-1985. Vacancy rates are not expected to rise much above the current record low levels of 0.2% as a result of new construction. However, the senior levels of government home ownership stimulation plans will likely have a beneficial impact on vacancy rates over the short term but the net impact is not yet known.

- The survey and market analysis combined indicate that non-profit housing activity in the RMOC could be raised from current production levels of 600 units/year to at least 800 units/year without any negative impacts on the private housing market. These conclusions should be reviewed after the net effect of the home stimulation programs have been analysed and/or if new rental programs are announced by the senior levels of government.

- The survey indicates that most potential users of non-profit housing would prefer to live in the municipality they are currently living in. This may pose some problems because of the lack and cost of suitable lands in the Cities of Ottawa and Vanier to meet their respective needs. It is suggested that transferability of units be considered between area municipalities. Furthermore, in certain instances acquisition and rehabilitation of existing rental housing units should also be considered. Increases in the maximum unit prices (MUPS) should also be considered for higher land costs in central city areas so that non-profit projects are viable throughout the Region. These matters would require the approval of the senior levels of government.

4. Recommendation 1

1. Targets for non-profit production throughout Ottawa-Carleton be set as follows:

   (a) A minimum of 2,400 units for the three year period 1983-1985.

(b) These targets include at least 800 units/year including 600 family units (150 assisted rental and 450 market rent) and 200 senior units (half of which would be market rent and the remaining half should be assisted rent).

(c) The distribution of units be similar to the suggested targets in Table 5.3 with approximately 65% of the units located in the City of Ottawa, 10% each in the Cities of Vanier, Nepean and Gloucester and 5% in the remaining municipalities. Additional units may also be justified from time to time as determined by waiting list information or other information of actual demand.

(d) These targets be interpreted flexibly to allow transferability of units between area municipalities and that area municipal activities be monitored on the basis of their 3 year activity given the problems of planning and delivering housing within one year.

Recommendation 2

These targets be referred to the area municipalities with a request that they be reviewed and that the area municipalities determine the programs or mix of programs, i.e. municipal, private or co-operative non-profit that best suits its requirements.

Recommendation 3

That this report be referred to the senior levels of government for review and with the recommendation that the unit allocations necessary to meet the requirements suggested in this report be provided for in their respective 1983, 1984 and 1985 budgetary process and that maximum unit price be modified to reflect the difference in land costs throughout the Region.

Recommendation 4

That the Regional Planning Department continue to closely monitor the rental housing situation in the Region with the intention of modifying the market analysis and targets contained herein, if the market for rental housing warrants such a change.

Recommendation 5

That Regional Council recommend to the Ontario Ministry of Municipal Affairs and Housing that

a) the proposed allocation of units among municipalities in the Region be taken only as a guideline provided the minimum target of 2,400 units is reached

b) that acquisitions of existing rental units be considered in urban areas where the loss of existing rental units to other forms of housing can be demonstrated.

NON-PROFIT HOUSING STUDY

1. INTRODUCTION

1.1 Background and Objectives

This study was initiated early in 1982 to assess the requirements for non-profit housing in the Regional Municipality of Ottawa-Carleton. Though administered by the Region, the study represents a joint effort of the Region, the area municipalities and Ontario's Ministry of Municipal Affairs and Housing.

This study forms part of the larger 'regional housing statement update' which is being prepared concurrently and will ultimately be considered as an appendix to the housing statement. Both studies have been overseen by a housing Technical Advisory Committee (TAC) which included representatives from the Regional Planning Department, area municipalities, CMHC, the Ministry of Municipal Affairs and Housing, HUDAC, private non-profit and co-operative housing groups and the Ottawa-Carleton Social Planning Council. While the report has been reviewed by the above noted agencies, some of the recommendations contained herein may require further consideration by these agencies.

The sponsors approached the study with slightly different objectives. For the Region, the main objective was to assess the demand for non-profit housing to assist in the establishment of housing targets apropos the housing responsibilities assumed by Regional Council in 1978.

For some area municipalities like the City of Ottawa and the rural municipalities of Goulbourn, Osgoode, Rideau and Cumberland, who already have established non-profit housing companies, the principal objective was to document the extent of demand for non-profit housing which hitherto had only been available through waiting list review. For others like the Cities of Nepean, Gloucester, Vanier and Kanata, who do not currently have municipal non-profit housing corporations, the main objective was to assess the relative demand for non-profit housing both for market rent as well as rent-geared-to-income units, prior to entering into the program.

The targets generated by this report are considered valid by the Ministry of Municipal Affairs and Housing for up to a 2 year period. Consequently, municipalities considering the establishment of non-profit corporations based on the results of this study should act expeditiously to establish them before the period expires. If they do not it is understood the municipality would be faced with the onerous task of replicating this survey and study.

For the Ministry of Municipal Affairs and Housing the study afforded an opportunity to test a relatively new methodology for the assessment of non-profit housing requirements. This methodology had been tested recently in the Region of Peel and is still in its development

stages. The Province recognizes the importance of establishing a methodology which can be used to assess non-profit housing requirements across the Province to ensure the fair distribution of non-profit housing allocations. This methodology has been published in draft form and is entitled "The Assessment of Non-Profit Housing Requirements in Municipalities in Ontario".

This summary report has purposefully been kept brief. For additional detail with respect to methodology the reader is referred to the above mentioned document. For additional detail with respect to the actual housing survey and market analysis the reader is referred to specific appendices to this report as well as the Regional Planning Department where all pertinent information will be kept on file.

2. OUTLINE OF STUDY AND METHODOLOGY

2.1 Objectives and Approach

The main objective of the study was to assess the extent of demand for non-profit housing in the Regional Municipality of Ottawa-Carleton. In order to assess this demand it is necessary to determine the extent of need for rent-geared-to-income housing as up to 25% of the units in a family project and up to 50% of the units in a senior project can be targeted for households requiring rent-geared-to-income housing.[1] As well, the analysis was to provide strategies for the Region and area municipalities in meeting the level of needs identified in the respective municipalities.

These objectives were reflected in these key questions:

- To what extent is there interest among eligible households, e.g. senior homeowners, senior renters and family household renters for non-profit housing? To what extent is interest likely to result in actual demand for non-profit housing?
- To what extent is there need for rent-geared-to-income units among those eligible households who are likely users of non-profit housing?
- To what extent can non-profit housing requirements be met with no disruption to the private market and other housing programs?

The Ministry of Municipal Affairs' manual provides the above questions be addressed by means of two independent research efforts:

1. An assessment of potential demand for non-profit housing and its composition using an extensive mailed questionnaire survey to potentially eligible households residing within the Region.
2. An assessment of the Region's rental housing market using standard market analysis techniques.

2.2 Methodology of the Housing Survey

The housing survey was undertaken using a questionnaire designed to assess the level of demand for non-profit housing. This questionnaire was designed by the Ministry of Municipal Affairs and Housing but modified by the Technical Advisory Committee to deal with the local housing situation. Changes were also made to the content and format of the questionnaire to improve its comprehensiveness and readability. A copy of the questionnaire is attached as Annex A.

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[1]The rent-geared-to-income mix in a non-profit project varies by program and target group. For example, the Municipal Non-Profit program in Ontario requires a maximum of 25% rent-geared-to-income units for family projects and up to 50% rent-geared-to-income units in senior citizen projects. Under the private non-profit and co-operative housing programs the family mix can range anywhere from 15% to approximately 35%.

The questionnaire was addressed to a systematic random sample of eligible households in each municipality drawn from the Ontario Ministry of Revenue 1981 Assessment files. Three subgroups were sampled including (i) non-senior renters, (ii) senior citizen renters, and (iii) senior citizen owners, comprising 37.5%, 13.0% and 15.8% of households respectively. A breakdown of total target households and the sampling factors used are found in Annex B and C respectively.[1]

The major components of the survey were:

1. to make preliminary contact with selected households by providing information about non-profit housing throughout the Region, so that their responses to the survey would be 'informed'

2. to assess interest in non-profit housing and then obtain limited demographic data from each household

3. for those who were interested, to determine whether the interest was in market rent as opposed to rent-geared-to-income units.

4. for those who were interested in rent-geared-to-income units, to assess the extent to which these households were actually eligible and "in need" by applying the Ministry of Municipal Affairs and Housing point rating scale (no attempt was made to assess the need for housing for those who were not interested in rent-geared-to-income housing)

5. finally, survey respondents who were interested in rent-geared-to-income housing but were not eligible under present program criteria[2] and "in need", were counted in with those households interested in market units, if they had indicated that they would accept either, or consider a market unit on the questionnaire.

In all, approximately 5,000 households (4,989 to be exact) or just over 50% of the sample responded to the survey prior to the end of July - cut-off date for returning questionnaires. For these data, estimates were calculated for the population as a whole by means of the sampling weights mentioned previously. All results presented here are presented as unadjusted (that is unadjusted for statistical variance) numbers falling into various categories out of the total target population of 125,719 households residing in the Region at the time.

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[1]All numbers represented in the survey are of course estimates and subject to the usual rules of 'statistical confidence' regarding estimates. In this survey, sample size for the urban and urbanizing municipalities was established on the basis of a 3% confidence interval assuming a 50% response rate - the rural municipalities were surveyed at a 7.5% confidence interval. In other words, based on sampling theory, the true value will be within a certain range of our estimate, e.g. in the case of the urban municipalities + or - 3%, 95 times out of a 100.

[2]Present program criteria limit access to rent-geared-to-income housing to persons aged 59 years and over, families with dependants and physically disabled individuals.

2.3 Methodology of the Market Analysis

The prime objective of the market analysis was to determine the extent to which non-profit housing might be created through new construction without disruption of either the existing private rental market or duplication of existing assisted housing programs.

The main factors in this analysis were:

1. Forecasting a range of rental housing requirements based on growth of rental households from 1983-1985.

2. Forecasting the total rental supply for the 1983-1985 period.

3. Assessing rental shortages in the 1983-1985 period.

4. Assessing the capacity of the existing assisted housing programs to meet demand in the Region.

The market analysis relied on:

1. 1976 and 1981 Census data on housing supply.

2. Canada Mortgage and Housing Corporation (local office) statistics on rental starts and completions, vacancies and effect of such programs as CHOSP (the Canada Home Ownership Stimulation Program) on the short term future rental situation.

3. Data from the Regional Planning office on population forecasts and statistics.

4. Data from area municipal planning offices on future rental unit starts, e.g. evidence of activity.

5. Data from the local housing authority on existing turnover rates.

6. Data from CMHC and the Ontario Ministry of Municipal Affairs on future non-profit allocations and project development.

2.4 Discussion of Methodology

2.4.1 Survey Methodology

As in all surveys, it is important to keep in mind that survey data such as that presented here should be regarded as a general guide to planning requirements. They provide broad strategic information and allow improved estimations of risks and benefits attached to alternative policies.

Thus for example it is important to note that the survey identifies a greater need for family housing (see next section) and smaller requirements for senior citizen housing. The exact numbers of each type of households will vary depending on the confidence level and other matters.

Also, it is important to remember that the survey is an assessment of the potential market only, and that the results may need to be updated if market conditions change. For example, at the time the survey was undertaken, interest rates were close to their record high and this may have influenced the demand for market rental units, which at this time may not be as great as the survey suggests.

Another important issue related to both the methodology and provincial policy is the fact that single persons and childless couples under 59 years of age are not generally eligible for rent-geared-to-income housing, although there are few exceptions. Though the survey did manage to assess some of the requirements of this group, the methodology applied limited the assessment of their requirements to market rent units only.

Prior to commencing the survey, the Technical Advisory Committee requested the Ministry of Municipal Affairs and Housing to include all households in determining rent-geared-to-income housing needs. This request was denied on the basis that the survey methodology was still in its developmental stages and that it should be tested in its present form prior to considering its expansion. Thus the results presented probably are an underestimate of the true demand.

Another area of contention with regard to the survey methodology is the treatment of non-responses when producing non-profit housing targets. According to the Ministry's recommended methodology, non-responses (which in the case of the RMOC represented some 50% of all sampled households) are treated as not being interested in non-profit housing. However there may be other valid reasons why certain households did not respond, i.e. unable to understand because of language, in ill health, moved, etc. For the purpose of the analysis it has been assumed that because they did not respond they are not interested.

In addition to the treatment of non-responses, respondents who indicated interest for a rent-geared-to-income unit but who were subsequently found to be ineligible (and had indicated that they would not otherwise accept a market rent unit) were dropped from the analysis. These two factors combine to produce very conservative housing requirement estimates.

2.4.2 Market Analysis Methodology

The market analysis, while not subject to the limitations surrounding the survey, also has significant limitations deriving mainly from its "one-point-in-time" nature. The main factor here is that market conditions may change dramatically as a result of volatile shifts in the economy, interest rates, government programs, etc. The market experience over the past year which saw interest rates reach record high levels, e.g. 22%, then drop to 12%, along with the introduction of home ownership stimulation programs by both levels of government, is ample evidence of those volatile shifts. This not only points out the difficulty of understanding the performance of the market during such unstable times but also the need to regularly update the assessment of the market.

3. THE NON-PROFIT DEMAND SURVEY: INDICATIONS OF NON-PROFIT HOUSING REQUIREMENTS

3.1 Survey Response

In general the response to the non-profit survey was quite favorable. This is evidenced by the fact that the Region achieved an overall revised response rate of 48.8%. The actual response rate before the deletion of households who are currently in assisted housing and non-senior owner categories was in excess of 50%. Across the Region, the response rate varied from a low of 43.2% in Vanier to a high of 58.3% in Kanata. An overall response rate of 45% was required to give statistically valid results. This requirement was exceeded, as Table 3.1 below shows.

TABLE 3.1

REVISED RESPONSE RATE

DATE: DEC. 8, 1982

OTTAWA	48.5%
NEPEAN	50.8%
VANIER	43.2%
KANATA	58.3%
GLOUCESTER	46.5%
RIDEAU	52.2%
OSGOODE	52.5%
WEST CARLETON	50.6%
GOULBOURN	45.8%
CUMBERLAND	48.8%
TOTAL	48.8%

3.2 Estimate of Potential Demand for Non-Profit Housing in 1983-1984

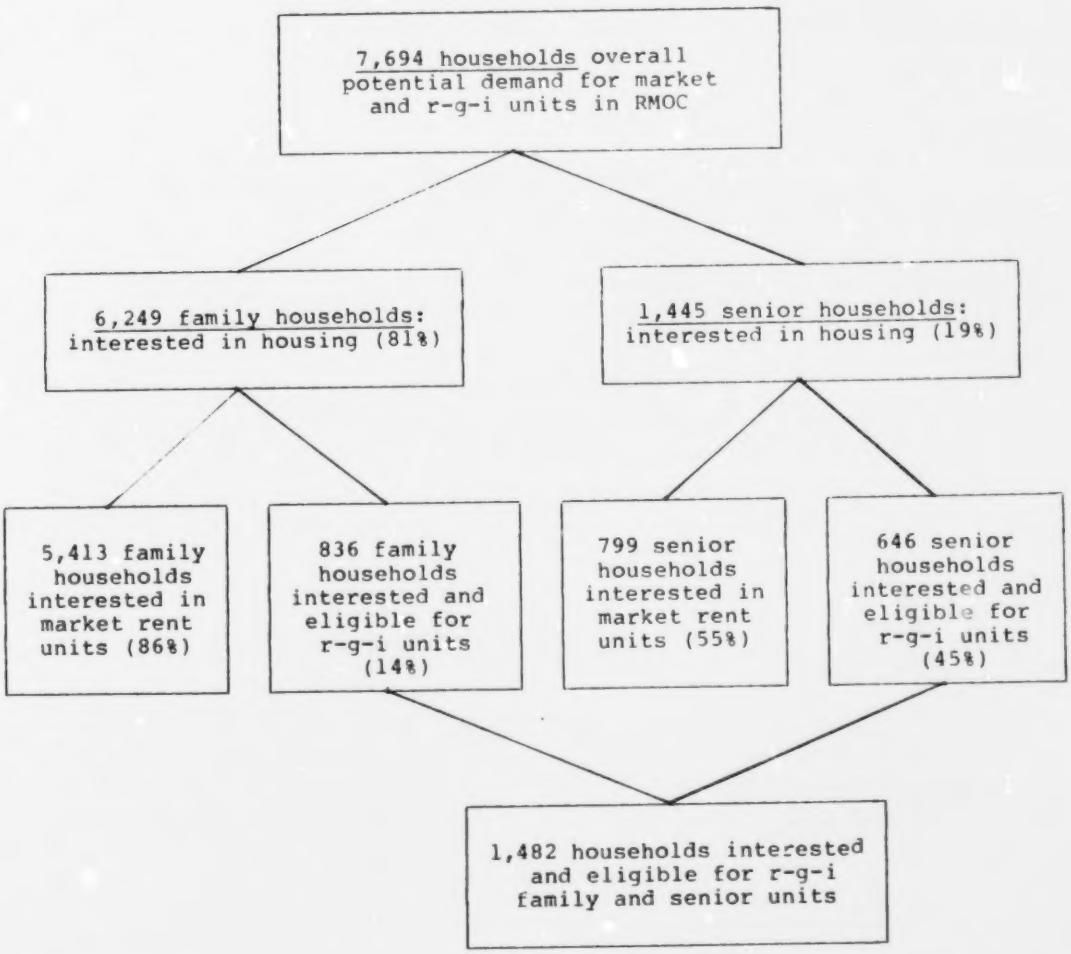
Demand estimates from survey results are usually expressed in terms of a range of demand. Because our sample was drawn at different sampling ratios for each municipality, we cannot be assured 100% accuracy of the responses. When producing targets we must therefore present the demand within a certain range. This is determined by applying the respective municipality weights and confidence intervals by target group (i.e. non senior tenants, senior tenants, senior owners) to the actual survey results. These results are found in Annex D.

For the purpose of observation, the following analysis is based on the actual weighted survey results which is commonly referred to in statistical terms as the mid-point.[1]

[1]Mid point demand represents the point target of demands expressed by the survey and is obtained by applying the net responses to the sample universe.

FIGURE 1

SURVEY ESTIMATES OF DEMAND FOR FAMILY AND SENIOR CITIZEN HOUSING FOR MARKET AND AND RENT-GEARED-TO-INCOME HOUSING IN RMOC


7,694 households overall potential demand for market and r-g-i units in RMOC
6,249 family households: interested in housing (81%)
1,445 senior households: interested in housing (19%)
5,413 family households interested in market rent units (86%)
836 family households interested and eligible for r-g-i units (14%)
799 senior households interested in market rent units (55%)
646 senior households interested and eligible for r-g-i units (45%)
1,482 households interested and eligible for r-g-i family and senior units

As can be seen in Figure 1 (attached), the survey results identified a potential mid-point demand for non-profit housing of 7,694 households in Ottawa-Carleton. Of these households, 6,249 non-senior households (81%) and 1,445 senior households (19%) were interested in non-profit housing.

Another major objective of the study involved estimating the number of families and senior citizen households likely to be eligible users of rent-geared-to-income units in non-profit housing. These numbers were determined using the survey data and the Ministry of Housing's criteria for assessing needs (principally financial need and inadequate housing). This analysis indicated a need for 836 family and 646 senior citizen rent-geared-to-income units.[1] The rest of the households demanded market rent units.

It is important to note the overall mix of both the demand for senior and family units. In both cases the demand for market rent units is more than sufficient to make projects viable on the basis of the regional totals.

The demand for non-profit housing by municipality and percent share of the overall regional total is depicted in Table 3.2.

TABLE 3.2

DEMAND FOR NON-PROFIT HOUSING BY GROUP' TYPE AND MUNICIPALITY BASED ON MID POINT

	GROUP:	FAMILY		SENIORS			
MUNICIPALITY	TYPE:	MARKET	RGI*	MARKET	RGI*	TOTAL	%
OTTAWA		3,935	600	517	453	5,505	71.5
NEPEAN		686	63	148	93	990	12.9
VANIER		262	70	45	52	429	5.5
KANATA		42	4	9	7	62	0.8
GLOUCESTER		412	84	52	32	580	7.5
RIDEAU		15	4	6	1	26	.33
OSGOODE		13	5	8	3	29	.37
W. CARLETON		4	-	9	1	14	.19
GOULBOURN		12	6	1	2	21	.25
CUMBERLAND		32	-	4	2	40	.50
RMOC		5,413	836	799	646	7,694	100

*RGI: Rent-geared-to-income.

[1]The need for a rent-geared-to-income unit was determined by using the MMAH's point rating system. Under the family point rating system a maximum of 15 points are alloted for shared facilities, a maximum of 10 points for a physical disability, a maximum of 10 points for the number of dependants, a maximum of 20 points for shelter costs and a maximum of 30 points for gross income per month. In order to be considered in need, a family must accumulate a total of 35 points or more. On the other hand, seniors must accumulate 40 points or more to be considered in need of a rent-geared-to-income unit. For this group, the Ministry's point rating system assigns basically the same points as for families with the exceptions of dependants where no points are given, gross monthly income where a maximum of 20 points are alloted and the addition of assets where a maximum of 20 points are allocated for a lack of funds.

Table 3.2 reveals that the vast majority of the units (5,505 or 71.5%) are required by Ottawa based households. This is simply because the City of Ottawa's share of the total target households in the Region is so large.[1] Significant requirements for non-profit housing both market and rent-geared-to-income are also identified for the Cities of Vanier, Nepean and Gloucester. None of these municipalities has a municipal non-profit corporation to develop the housing demanded.

Housing requirements in the urbanizing municipalities of Kanata and Cumberland are relatively modest with both being mainly for market rental units. This might be more appropriately supplied by the private market. In the case of Cumberland, there may be sufficient rent-geared-to-income demand arising from Gloucester residents in the Orleans area which might suggest a joint family project to meet the growing requirements of that expanding urban area. This requirement should be more thoroughly reviewed by the respective municipalities.

Non-profit housing requirements in the rural municipalities are fairly low. This is not unexpected as each municipality with the exception of the Township of West Carleton has established and developed non-profit senior citizen projects for their residents. The rural municipalities have been attracted to the non-profit program not only because of the housing it provides for its senior residents but also because it frees up ownership units which then become available to other, perhaps younger, households. Those households might have otherwise had to look to the urban areas for accommodation.

The Township of West Carleton has recently completed a 100% survey of area senior residents which has justified the need for one project in that Township. The results of the Township of West Carleton survey fall within the range of results determined by the regional survey.

Most rural municipalities have already created non-profit housing corporations and have built projects which in turn have generated demand for additional units. This demand is reflected in relatively long waiting lists which may be larger than the needs-tested-demand evident from the survey. Though these two estimates are not strictly comparable[2] it may be prudent to assess waiting lists as evidence of demand from time to time.

3.3 Demand Expressed as a Percentage of the Total Target Population

Table 3.3 depicts the total estimate of demand expressed as a percentage of the total population. This table is useful in interpreting the survey results across the various municipalities. In total, the potential demand for non-profit units expressed by the mid-point represents 6.1% of the region's targeted population (7,694 units out of 125,719 households).

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[1] 73% or 92,383 out of 125,719 targeted households are located in the City of Ottawa.

[2] The survey results depict actual need-tested-demand which have been discounted (for senior homeowners) and therefore are not directly comparable with the unqualified demand generated from waiting lists. For example the regional survey shows a demand for one r-g-i unit in Rideau Township. At the time of our survey, 33 people appeared on their waiting list. However, of the 33 applications, only 2 applicants were eligible for rent-geared-to-income units.

TABLE 3.3

DEMAND AS A PERCENTAGE OF THE TOTAL TARGET POPULATION

MUNICIPALITY	TARGET HOUSEHOLDS	POTENTIAL MID-POINT DEMAND	%	% BY TARGET GROUP	
				FAMILIES	SENIORS
OTTAWA	92,383	5,505	5.9	8.7	2.4
NEPEAN	12,619	990	7.8	9.8	4.8
VANIER	6,224	429	6.9	8.0	4.6
KANATA	1,118	62	5.5	8.1	2.9
GLOUCESTER	7,909	580	7.3	9.3	3.2
RIDEAU	1,025	26	2.5	6.8	0.9
OSGOODE	1,062	29	2.7	5.2	1.5
W. CARLETON	1,109	14	1.3	1.3	1.2
GOULBOURN	1,028	21	1.9	4.8	0.3
CUMBERLAND	1,242	38	3.0	5.1	1.0
TOTAL	125,719	7,694	6.1	8.7	2.7

As can be seen from Table 3.3, interest in non-profit housing expressed as a proportion of the target households of the respective municipalities range from a high of 7.8% in Nepean to a low of 1.3% in West Carleton.

In terms of overall interest, the table indicates a high proportion of demand in the urban and urbanizing municipalities. Generally speaking the level of demand for non-profit housing is lower in the rural municipalities. Given the predominance of ownership housing in these areas, this is not unexpected.

A look at demand by target groups shows a generally higher proportion of demand for family housing than for senior citizen housing. The highest proportion of interest both by families and seniors was expressed in the City of Nepean with 9,8% and 4.8% respectively.

3.4 Locational Preference

One of the questions asked in the survey referred to the locational preferences of the households surveyed. The combined responses of all target groups are represented in Table 3.4.

TABLE 3.4

LOCATIONAL PREFERENCE OF TOTAL INTERESTED RESPONDENTS

MUN. OF ORI.	DESTINATION										
	OTT.	VAN.	NEP.	GLOU.	KAN.	CUMB.	GOUL.	RID.	OSG.	W. CAR.	TOTAL
	%	%	%	%	%	%	%	%	%	%	%
OTT	88.7	4.0	3.4	1.5	0.6	-	-	-	-	1.2	100
VAN	29.0	65.6	1.9	2.6	-	0.6	-	0.3	-	-	100
NEP	8.5	0.7	88.7	0.2	1.5	-	-	-	0.2	0.2	100
GLOU	19.8	4.2	4.5	70.3	-	-	-	0.6	0.3	0.3	100
KAN	3.4	-	5.1	-	90.7	-	-	-	-	0.8	100
CUMB	14.4	4.5	2.7	10.8	-	66.7	-	-	-	0.9	100
GOUL	6.2	-	9.5	-	3.1	-	78.1	3.1	-	-	100
RID	6.1	-	9.1	-	3.0	-	-	81.8	-	-	100
OSG	9.8	-	9.8	3.9	-	2.0	-	7.8	66.7	-	100
W.CAR	10.3	3.5	-	-	10.3	-	3.5	-	-	72.4	100

Analysis of the locational preference table suggests that the majority of respondents would prefer to remain in their present municipality if they were offered a non-profit unit. Kanata residents expressed the greatest desire to remain with over 90% of all respondents preferring Kanata over the other locations. Interest to remain in Ottawa and Nepean was also very high at almost 89%. Residents in Vanier and Gloucester were more inclined to move with 29.0% and almost 20.0% of respondents from these municipalities preferring a City of Ottawa location.

This analysis suggests that units will most easily attract people from the same municipality. However, certain municipalities, such as the Cities of Ottawa and Vanier because of a scarcity of suitable building sites and the cost of land may not be able to meet the needs of their residents. Since most of the serviced land for future development will be in Cumberland, Gloucester, Kanata and Nepean, it may be desirable to develop non-profit units in these municipalities not withstanding people's locational preferences.

A more detailed breakdown of locational preferences by target group and by areas within certain municipalities may be found in Annex D & E. This breakdown indicates that contrary to common beliefs, locational interest did not vary for non-seniors and seniors as both groups indicated a strong desire to remain in the municipality where they are living.

FIGURE 2

MARKET ANALYSIS RESULTS - RMOC
TO DECEMBER 1982

Current Rental Market

A - Current Rental Stock as of December 1982	102,365
B - Current Number of Rental Households	101,638
C - Vacant Units (A-B)	727
D - Required Rental Stock if 3% is Vacancy Rate Target (B x 1.03)	104,687
E - Current Vacancy Shortage (D-A)	(2,322)

Rental Survey Stream

F - Estimated Additions to 3 year new supply 1983-1985	6,644
G - Estimated Annual Rental Unit Loss (based on average demo-conversion 76-81)	(251)
H - Net Rental Additions 1983-1985 (F-G)	6,393
I - Total Estimated Housing Stock-1985 (A + H)	108,758

Estimated Rental Demand - 1983-1985

J - Low Estimate (Annual Average Growth from 1976-1981)	108,078
K - High Estimate (Annual Average Rate of Growth)	109,133

Total Net 3 Year Rental (Snortage) or Surplus

L - Based on Low Demand (I-J)	680
M - Based on High Demand (I-K)	(375)

Net Future Rental Demand

Required Rental Stock in 1985 if a 3% Vacancy Rate is Target

N - Based on Low Demand (J x 1.03)	111,320
O - Based on High Demand (K x 1.03)	112,407

Net Shortage or Surplus
Assuming 3% Vacancy Rate is Target

P - Based on Low Demand (I-N)	(2,562)
Q - Based on High Demand (I-O)	(3,649)

4. THE MARKET ANALYSIS

The second major component of the study is the market analysis. This analysis investigates the current and potential short term growth in the rental supply against growth in demand for rental accommodation. This is necessary in order to determine whether there is additional scope for non-profit housing in the Region.

4.1 The Private Rental Sector

While some of the demand for non-profit housing will come from newly formed households, the vast majority of the population will be drawn from the existing rental accommodation. This is simply because most non-profit housing is directed to family households or seniors. To the extent that tenants move out of private units into the non-profit sector, public or private, these could be seen as 'draining' the existing stock. This will present problems for private landlords only if they are unable to replace these tenants with other households. As far as the market portion of the non-profit housing is concerned, this is not likely to happen for the following reasons:

- current vacancy levels are at record low levels

  The private rental situation in the Region has deteriorated significantly in less than two years. In October 1980 the vacancy levels as reported by CMHC was a healthy 3.5%. By October 1982 this vacancy level had fallen to 0.2% representing the tightest rental market in the country. Figure 2 outlines the current and projected rental situation with regard to overall rental requirements and anticipated supply. This analysis indicates an immediate need for an additional 2,322 rental units (above and beyond the 2,000-2,500 rental units which are required in each of the next three years to meet new rental household demand) to bring the vacancy level in the RMOC to the accepted 3% norm.

- current levels of construction are insufficient to meet growth related housing demand for 1983 and 1984

  Rental completions in 1982 were 2,203 units. In 1983, 1984 and 1985 rental completions are estimated to be 1,810, 2,100 and 2,300 units respectively. This is close but still just short of meeting the annual requirements of between 2,000 and 2,500 units/year. Consequently, the vacancy level is not likely to improve, as a result of new rental construction.

- future private market rental projects are uncertain as most of new projects in the last few years have been stimulated by government programs

  Private market rental starts in 1981, 1982 and 1983 are almost all attributable to various government incentive programs. The Ontario Rental Construction Loan Program, for example, was directly responsible for building between 1,100-1,400 rented units in 1981 and 1982 and

the CRSP program is responsible for some 1,200 starts in late 1982 and early 1983. The ORCL program was terminated in 1981 (i.e. no new projects are being funded) and the future of the CRSP program beyond 1983 is unsure. Without new government stimulation plans the outlook for the rental market beyond 1985 is bleak.

- in terms of built form, e.g. highrise vs. ground oriented housing, non-profits and the private market are generally building for different markets

Over the past several years it has become apparent that the private and public sector have been building for different segments of the market. Generally, the private rental sector has directed its new construction to highrise building with a predominance of one and two bedroom units catering to the highly mobile single person or childless household. The non-profit program has generally developed row and townhouse projects for families. Out of some 2,200 units approved for construction under the ORCL program, only 14% are ground oriented. None of the 1,200 CRSP units are ground oriented. Although there appears to be little competition with the private sector in new housing construction, new non-profit row housing projects may compete somewhat with existing private market rental row housing. This competition is not expected to be significant however because the vacancies in the rental row market are virtually non-existent. In the last CMHC survey there were 17 rental row vacant units out of almost 9,000 rental row units surveyed. Furthermore, older private market units will probably maintain a price advantage over the new non-profit units which have to be marketed at or around the low end of the market for similar new units in the area.

- non-profit housing already represents a significant proportion of the areas new rental completions and should likely continue to do so in the forseeable future

As can be seen from Table 4.2 - senior government commitments to non-profit housing in its various forms (i.e. municipal, private and co-operative housing) already represent a significant component of the areas rental starts. Assuming commitments for non-profit housing represent completions in the following year, non-profit activity has contributed between 30-50% of all rental completions between 1981 and 1983.

TABLE 4.2

NON-PROFIT COMMITMENTS AS % OF TOTAL REGIONAL RENTAL COMPLETIONS - 1980-1982

1980 Non-Profit Commitments	465
1981 Rental Completions	966
% non-profit of total Rental Completions	48.1%
1981 Non-Profit Commitments	648
1982 Rental Completions	2,203
% non-profit of total Rental Completions	29.4%
1982 Non-Profit Commitments	711
1983 Estimated Rental Completions	1,842
% non-profit of total Estimated Rental Completions	38.6%

While the above analysis suggests limited competition between private market and non-profit housing units as a result of new rental construction, there is the possibility that the current government home ownership stimulation programs like Ontario's Renter Buy Program and the federal government's CHOSP (Canadian Home Ownership Stimulation Program) will ease the vacancy situation in the Region by the end of 1983. Preliminary figures from the local CMHC office indicates that approximately 4,000 households in the Region have taken advantage of the grants. Their move from their existing accommodation (probably rental) to home ownership should free up some existing units. The net effect of these programs will not be known until late 1983 and/or early 1984 when the vacancy rate figures are available as it is not known how many of these 4,000 households will be vacating previously shared rental accommodation or had been doubling up in ownership units, e.g. living with parents.

To summarize, the market analysis indicates a continuing period of relatively low vacancy levels because new rental housing construction will not meet anticipated needs. The demand exhibited in the non-profit housing survey can be met without significant disruption to the private market. There is however some uncertainty at this time as to the net effect on the rental market of the current home ownership stimulation programs. In light of this situation the market analysis will be reviewed early in 1984 to see what effects these programs have had on the rental market. In the interim the scale of non-profit housing should be increased somewhat to improve the vacancy situation over the longer term but not dramatically, as the effects of the ownership programs are not yet known.

4.2 Social Housing Sector

While concerns of unreasonable competition with the private market stem from arguments of market interference, concerns with the public sector relate to competition for the same clients and the possible creation of surplus supply of some assisted housing which could result in higher public subsidies. These concerns are not likely to be realized for the following reasons:

- current waiting lists of the major housing authorities, e.g. OCRHA, the Ottawa-Carleton Regional Housing Authority, and City Living, the City of Ottawa Non-Profit Housing Company, are at record high levels

  During the past 18 months the waiting list of the Region's two largest social housing agencies have increased by more than 100% and now represent some 3,000 households (1,700 with OCRHA and 1,300 with City Living) with approximately 30% of those classified as very urgent.[1]

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[1]Urgent defined as those households with 60+ points based on OCRHA's point rating system and those classified "very urgent" by City Living based on their classification system.

- the economic downturn and vacancy levels in the private market have resulted in declining turnover rates

  Over the past few years the turnover rates in existing social housing have declined from around 15% to approximately 12%. This is a reflection both of the downturn in the economy as well as the tight vacancy situation in the rental market. Accordingly, the existing stock of social housing albeit quite large cannot be relied on to absorb as much low income housing demand as in the past (see Annex G).

- instead of increasing its portfolio through new additions OCRHA's portfolio is in fact shrinking instead of expanding as a result of landlords opting not to renew existing rent supplement agreements

  Based on discussions with landlords who have expressed a desire not to continue with the rent supplement program, OCRHA have concluded they could lose up to 250 units through attrition over the next five years, which is roughly 25% of their rent supplement portfolio. Some of the rent-geared-to-income units in non-profit housing could be used to compensate for these losses. OCRHA was expecting up to 500 new rent supplement units to be made available as part of the ORCL and CRSP programs but these units are now doubtful given the lack of unit allocations to pick them up.

In summary, there appears to be little likelihood that there will be any major implications of an expanded non-profit program given the extent of the waiting lists and the decreasing turnover rates for existing housing.

SECTION 5

Integrating the result of the survey and market analysis - The setting of targets

Given the assessment of the current rental situation and likely trends over the next few years, there is certainly scope for additional non-profit development throughout Ottawa-Carleton.

The question of the extent of that development depends primarily on the role the region and the area municipalities (who are responsible for delivering housing in the Region) see for themselves on easing the rental situation and what realistically can be achieved. The latter concerns relates to economic realities, primarily in terms of unit allocations from the senior levels of government as well as political realities including the desire and ability of the area municipalities to meet the housing challenge and the availability of suitable building sites.

5.1 Options for Additional Non-Profit Housing Development

As we have already seen, non-profit housing activity currently represents a significant level of the region's rental housing activity. The extent to which this level of activity should be expanded depends on the role the Region and the area municipalities establish in meeting the growing housing requirements of the area residents. Three possible strategies have been identified by MMAH for intervention in the market. These strategies and their respective implications for the regional market are presented below and are summarized in Table 5.1.

Option 'A' - To Meet New Growth in Rental Households

Under this option additional non-profit development would be limited to meeting the shortfall between the anticipated growth in households between 1983-1985 and the expected new rental completions. Based on the market analysis this option would require the construction of approximately 460 units (representing the average based on the low and high household growth requirements) over the 1983-1985 period (see Figure 2). Though providing for growth in households, this option does not provide for any improvement in the current critically low vacancy situation, something which must be corrected if the rental market is to operate normally.

Option 'B' - To Stabilize the Vacancy Situation

Under this option, additional non-profit development would be directed to stabilizing the vacancy situation (e.g. would ensure no further deterioration) from the present 0.2% level. Based on the market analysis, this option would require the construction of approximately 750 units over the 1983-85 period. Because the vacancy level is so low, the implications of the option for the Region are similar to that presented for Option 'A'.

Option 'C' - To Improve the Vacancy Situation

Under this option, additional non-profit development would be directed to increase vacancy levels in the Region to the accepted 3% norm. This would require the construction of some 3105 units between 1983-1985, if it was agreed that the vacancy situation should be improved over that period.

TABLE 5.1

ADDITIONAL UNITS REQUIRED
1983-1985

	Low Growth	High Growth	Average
Alternative 'A'	0	917	459
Alternative 'B'	100	1,396	748
Alternative 'C'	2,562	3,649	3,105

To-date, non-profit housing activity, though significant has not been directed to any overall regional objectives. Our analysis has shown that there is considerable scope to expand this level of producation by virtue of the need to improve the vacancy situation in the region to 3%. Not only would this provide for a greater level of mobility within the rental market but also would support the objective of providing needed housing opportunities to accommodate our expanding employment base.

5.2 Determining Appropriate Targets

Within the context of improving the vacancy situation there are constraints that must be considered in determining appropriate non-profit targets. These constraints are discussed below.

5.2.1 Program Constraints

In assessing estimates of need and demand for non-profit housing the MMAH routinely applies the lower range of the confidence interval to determine the maximum number of units that could be supported. As indicated previously, these figures are found in Annex G and have been reproduced in Table 5.2. The rationalization for this is that it is better to underestimate demand and have to build more, than to overestimate it and build too much. In a period of limited economic resources this rationale is supportable.

TABLE 5.2

LOW RANGE OF DEMAND/NEED ESTIMATES
FROM THE REGION'S NON-PROFIT HOUSING SURVEY

	UNIT TYPE			
	FAMILY		SENIORS	
	MARKET	ASSISTED	MARKET	ASSISTED
OTTAWA	3,215	314	249	203
VANIER	215	45	27	32
NEPEAN	568	25	107	52
GLOUCESTER	336	48	33	17
KANATA	30	0	9	7
CUMBERLAND	21	0	4	2
GOULBOURN	0	0	1	2
WEST CARLETON	0	0	0	1
RIDEAU	5	0	0	1
OSGOODE	0	0	0	0
RMOC	4,390	432	430	317

5.2.2 Economic Constraints

Non-profit housing activity in Canada is funded primarily through an interest rate writedown by the Federal Government. Because of the cost of the writedown, the number of units allocated each year are limited and are controlled through a process of unit allocations by program to provinces and to municipalities. The private non-profit and co-operative non-profit housing programs are administered directly by the Federal Government through CMHC and the municipal non-profit program is administered by the Ontario Ministry of Municipal Affairs and Housing.

Over the past three years unit allocations for non-profit housing averaged around 600 units/year to this Region. Based on this level of allocation, it would take approximately four years to satisfy the demand estimates outlined in Table 5.2,[1] with no units directed towards meeting the objective of increasing the vacancy rate to 3%. To meet the demand expressed in Table 5.2 and to provide for a 3% vacancy level by 1985 would require in the neighbourhood of 1600 non-profit units/year, a figure which is likely beyond the capability of the area's housing agencies to deliver and well beyond the senior levels of government's ability to finance.[2] Given the reality of the situation, and the current uncertainty with respect to the net effect of the home ownership stimulation program it is recommended that the region aim for increasing the vacancy rate gradually. Based on this analysis, the construction of 800-850 non-profit housing units/year, would be justified. This level of production would allow time for the vacancies that may arise as a result of the home ownership stimulation plans to be absorbed smoothly in the market, while at the same time gradually improving the Region's vacancy rate.

5.3 Suggested Targets

From this assessment, the market analysis and survey results suggest that the region, the area municipalities and the non-profit groups in the region consider increasing the level of non-profit activity from approximately 600 units/year to at least 800 units/year.

This above estimate can be broken down into family and senior citizen units based on the mix of demand estimated from the survey results. The mix of market and assisted rental units is then derived according to current programatic guidelines which generally provide for up to 50% assisted rental units in senior citizen projects and up to 25% of rental units in family projects.

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[1] Based on meeting the demand for rent-geared-to-income family units. i.e. 4 x 432 = 1,738 and rent geared-to-income senior units, i.e. 2 x 317 = 634. Total requirement of approximately 2,300 units.

[2] This is based on Alternative 'C' of Table 5.1 and assumes the existing non-profit activity will continue at around 600 units/year.

Table 5.3 shows the breakout of this target by municipality and target group. Each target group is disaggregated into market rental and assisted rental units given policy guidelines.

TABLE 5.3

SUGGESTED TARGETS JUSTIFIED BY HOUSING MIX POLICIES

1983-1985

MUNICIPALITY	FAMILY		SENIORS		TOTAL UNITS
	RENT-GEARED-TO-INCOME	MARKET	RENT-GEARED-TO-INCOME	MARKET	
OTTAWA	314	942	203	203	1,662
VANIER	45	135	27	27	244
NEPEAN	25	75	52	52	204
GLOUCESTER	48	144	17	17	226
KANATA	0	0	7	7	14
CUMBERLAND	0	0	2	2	4
GOULBOURN	0	0	1	1	2
WEST CARLETON	0	0	1	1	2
RIDEAU	0	0	1	1	2
OSGOODE	0	0	0	0	0
RMOC	432	1,296	311	311	2,360

These figures suggest a total three year production of some 2,360 units which is consistent with the findings of the market analysis.

There are however, several potential problems associated with these targets. These problems are briefly discussed below:

- over 70% of all the units are targetted for the City of Ottawa. This tends to perpetuate the situation where the vast majority - well over 95% of all assisted housing units in the Region are within the City of Ottawa.

- some municipalities which demonstrated demand for non-profit market housing are not represented in the targets as there was insufficient assisted rental demand to justify the development of non-profit housing. This occurred in the City of Kanata and the Townships of Cumberland and Rideau.

- there may be a problem of finding suitable sites. This is particularly a problem for the City of Vanier and to a lesser extent for the City of Ottawa where a lack of development land and the high cost of many of the vacant parcels may preclude the development of non-profit housing units under existing maximum unit prices (MUPS).

Some of the problems identified above could be somewhat overcome with a flexible approach to the meeting of the targets suggested above. This flexibility could be achieved by allowing some degree of transferability of units from one municipality to another. For example,

there is really not much difference between a project located in the suburbs of Ottawa and one located within the City of Nepean or Gloucester (inside the Greenbelt) or one located in the Gloucester portion of the East Urban Community or Cumberland's portion.

Similarly a flexible approach is also required with respect to the actual development of units. Problems with shifting unit allocations, community groups, rezonings, etc., render it difficult if not impossible to develop a building program accurately. Consequently, it is recommended that the targets be approved as guidelines only and that municipalities be encouraged to transfer units to other area municipalities should developmental problems arise.

The issues of lack of locations and higher land costs in developed areas could be overcome in the following ways. In municipalities like Vanier and the City of Ottawa acquisition and rehabilitation of existing properties should be pursued, where there is the threat that these rental units might be lost. At this time this approach is not generally supported by the senior levels of government, however it represents a viable alternative for cities like Vanier and Ottawa which are already extensively developed. In addition, the maximum unit price (MUPS) for inner city locations should be increased so that non-profit housing activity remains viable throughout the Region and not just in the rural and suburban areas where land costs are less.

OTTAWA-CARLETON

NON-PROFIT HOUSING SURVEY

THIS BOOKLET ISSUED SEPARATELY TO
MEMBERS OF COUNCIL.

NON-PROFIT HOUSING SURVEY

TABLE 1.0

TOTAL TARGET HOUSEHOLDS

MUNICIPALITY	NST	ST	SO	NSO	0*[1]	R*[1]
OTTAWA	52,108	21,191	19,084	25,375	22,006	2,037
NEPEAN	7,617	1,385	3,617	12,688	745	365
VANIER	4,153	1,076	995	1,249	92	197
KANATA	568	105	445	4,168	295	23
GLOUCESTER	5,309	673	1,927	12,027	914	289
RIDEAU	280	87	658	1,602	110	13
OSGOODE	348	90	624	1,577	119	20
WEST CARLETON	308	79	722	1,824	120	18
GOULBOURN	374	113	541	1,719	113	41
CUMBERLAND	625	111	506	3,063	182	31
TOTAL	71,690	24,910	29,119	65,292	24,696	3,034

[1]Households that appeared on the assessment tapes with no provisions for age.

TABLE 2.0

SAMPLING FACTORS

MUNICIPALITY	NST	ST	SO
OTTAWA	1/38	1/38	1/38
NEPEAN	1/7	1/2	1/12
VANIER	1/5	1/3	1/3
KANATA	1/2	1/1	1/1
GLOUCESTER	1/5	1/1	1/8
RIDEAU	1/3	1/1	1/6
OSGOODE	1/4	1/1	1/5
WEST CARLETON	1/3	1/1	1/6
GOULBOURN	1/4	1/1	1/7
CUMBERLAND	1/2	1/1	1/1

Annex D

OTTAWA-CARLETON HOUSING SURVEY: ESTIMATE
OF DEMAND BASED ON TOTAL SAMPLE - ASSUMES THE
NON-RESPONSES ARE NOT INTERESTED

	MARKET RENT						RENT-GEARED TO INCOME					
	SENIORS			FAMILIES			SENIORS			FAMILIES		
MUNICIPALITY	LOW RANGE	MID POINT	HIGH RANGE	LOW RANGE	MID POINT	HIGH RANGE	LOW RANGE	MID POINT	HIGH RANGE	LOW RANGE	MID POINT	HIGH RANGE
OTTAWA	249	517	785	3,215	3,935	4,656	203	453	702	314	600	887
VANIER	27	45	63	215	262	309	32	52	72	45	70	94
NEPEAN	107	148	188	568	686	805	52	93	135	25	63	101
GLOUCESTER	33	52	71	336	412	488	17	32	47	48	84	121
KANATA	9	9	9	30	42	54	7	7	7	0	4	8
CUMBERLAND	4	4	4	21	32	43	2	2	2	-	-	-
GOULBOURN	1	1	1	0	12	24	2	2	2	0	6	11
W.CARLETON	0	9	19	0	4	8	1	1	1	-	-	-
RIDEAU	0	6	12	5	15	26	1	1	1	0	4	8
OSGOODE	0	8	16	0	13	25	0	3	7	0	5	12
RMOC	430	799	1,168	4,390	5,413	6,438	317	646	976	432	836	1,242

Report 7
Planning

LOCATIONAL PREFERENCE CHART

NON-SENIOR TENANT HOUSEHOLDS

MUNICIPALITY OF ORIGIN	OTTAWA			VANIER	NEPEAN			GLOUCESTER			KANATA		CUMBERLAND		GOULBOURN	RIDEAU	OSGOODE	W.CARLETON	TOTAL
	DOWN-TOWN %	INNER SUB %	OUTER SUB %	%	URBAN IN %	URBAN OUT %	RURAL %	URBAN IN %	URBAN OUT %	RURAL %	URBAN %	RURAL %	URBAN %	RURAL %	%	%	%	%	%
OTTAWA	46.2	27.9	13.7	5.6	2.6	0.5	-	-	-	-	0.5	-	-	1.0	-	-	-	1.0	100
VANIER	15.9	11.5	3.9	54.2	-	0.5	0.5	1.4	1.4	-	-	-	-	-	-	-	-	-	100
NEPEAN	5.5	2.7	0.9	0.5	73.3	10.4	3.6	0.5	-	-	1.8	0.5	-	-	-	-	-	-	100
GLOUCESTER	4.4	11.0	6.6	2.7	3.3	1.6	-	52.2	7.1	9.3	-	-	-	-	-	0.6	-	0.6	100
KANATA	-	4.7	-	-	2.3	2.3	-	-	-	-	83.7	7.0	-	-	-	-	-	-	100
CUMBERLAND	10.0	3.3	-	3.3	-	-	-	-	3.3	3.3	-	-	40.0	33.8	-	-	-	-	100
GOULBOURN	-	-	-	-	-	-	20.0	-	-	-	-	-	-	-	80.0	-	-	-	100
RIDEAU	-	10.0	-	-	-	10.0	-	-	-	-	-	-	-	-	-	80.0	-	-	100
OSGOODE	-	13.3	-	-	6.7	-	6.7	13.3	-	-	-	-	-	6.7	-	6.7	46.7	-	100
W.CARLETON	-	-	-	20.0	-	-	-	-	-	-	20.0	-	-	-	20.0	-	-	40.0	100

LOCATIONAL PREFERENCE CHART

SENIOR TENANTS

MUNICIPALITY OF ORIGIN	OTTAWA			VANIER	NEPEAN			GLOUCESTER			KANATA		CUMBERLAND		GOULBOURN	RIDEAU	OSGOODE	W.CARLETON	TOTAL
	DOWN-TOWN	INNER SUB	OUTER SUB		URBAN IN	URBAN OUT	RURAL	URBAN IN	URBAN OUT	RURAL	URBAN	RURAL	URBAN	RURAL					
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
OTTAWA	36.9	32.3	19.2	1.5	3.1	0.8	-	3.1	0.8	-	0.8	-	-	-	-	-	-	1.5	100
VANIER	10.4	13.2	0.9	67.0	3.8	-	-	1.9	-	-	-	-	-	1.9	0	0.9	-	-	100
NEPEAN	2.5	2.9	2.5	0.8	[illegible]	9.1	3.3	-	-	-	0.8	-	-	-	-	-	0.4	0.4	100
GLOUCESTER	4.1	8.7	4.6	5.8	2.9	1.2	-	[illegible]	8.1	7.6	-	-	-	-	-	0.6	0.6	-	100
KANATA	-	2.7	-	-	5.3	-	-	-	-	-	77.3	13.3	-	-	-	-	-	1.3	100
CUMBERLAND	6.2	7.4	1.2	4.9	2.5	-	1.2	1.2	8.7	2.5	-	-	21.0	42.0	0	0	0	1.2	100
GOULBOURN	-	9.1	0	0	4.5	-	-	-	-	-	4.5	-	-	-	77.4	4.5	-	-	100
RIDEAU	-	-	4.4	-	8.3	-	4.4	-	-	-	4.3	-	-	-	-	82.6	-	-	100
OSGOODE	-	5.6	2.8	-	-	-	-	-	-	-	-	-	-	-	-	8.3	75.0	-	100
W.CARLETON	4.2	-	8.3	-	-	-	-	-	-	-	8.3	-	-	-	-	-	-	79.2	100

Annex G

SUMMARY OF OTTAWA-CARLETON REGIONAL HOUSING AUTHORITY TURNOVER 1974-1982

FAMILY TURNOVER

YEAR	RATE*	NUMBER**	BASE UNITS***
1982	13.13	518	3,944
1981	15.97	633	3,963
1980	13.75	578	4,203
1979	15.26	630	4,127
1978	15.38	634	4,122
1977	15.46	637	4,120
1976	16.79	691	4,118
1975	17.20	681	3,960
1974	15.90	569	3,580

SENIOR TURNOVER

YEAR	RATE	NUMBER	BASE UNITS
1982	5.92	355	5,998
1981	6.41	384	5,991
1980	6.87	355	5,165
1979	5.86	296	5,053
1978	7.89	370	4,693
1977	7.52	353	4,693
1976	7.51	343	4,567
1975	7.84	281	3,584
1974	7.42	174	2,345

TOTAL PORTFOLIO TURNOVER

YEAR	RATE	NUMBER	BASE UNITS
1982	8.78	873	9,946
1981	10.22	1,017	9,954
1980	9.96	933	9,368
1979	10.09	926	9,180
1978	11.39	1,004	8,815
1977	11.22	990	8,813
1976	11.91	1,034	8,682
1975	12.75	962	7,544
1974	12.54	743	5,925

* RATE AS EXPRESSED BY THE TOTAL OF APPLICANTS HOUSED RELATIVE TO THE NUMBER OF UNITS IN THE PORTFOLIO

** NUMBER REPRESENTS THE TOTAL NUMBER OF APPLICANTS HOUSED IN ONE YEAR

*** BASE UNITS REPRESENT THE ANNUAL AVERAGE NUMBER OF UNITS IN THE PORTFOLIO